Site Visit Issue Worksheet Guidelines

This worksheet explores an issue requiring verification and/or clarification at the site visit.

Application Number_____   Priority_____ (High, Medium, Low)   Examiner Initials_____

Item Ref: _____Issue **(Record only one issue per page):**

Number sequentially (e.g., 1.1-1, 1.1-2, etc.)

Prioritize based on possible impact on score, Key Factors.

Consensus Evaluation: *Strength* _____ + _____ ++ *Opportunity for Improvement*_____ - _____ -- Not originally evaluated

Strategy (What information do you need, and how do you intend to obtain it, e.g., persons to interview, questions to ask, specific documents and for what purpose, and observations to make?):

Be as complete and specific as possible. Expect to make changes and additions during the site visit, based on new findings. For deployment issues, link walk-around questions to the interview strategy. The Judges want to see that the issue was thoroughly investigated and what method was used to accomplish the investigation.

Findings (Observations,

This is an audit trail of the findings. Based on the site visit issue and the interview approach, what was learned? Provide specific information (e.g., documents reviewed, overall responses to the deployment questions). Remember to verify and clarify issues from the Consensus Scorebook**.**

Conclusions (What is

Based on the findings above, what is the conclusion? Is the approach sound and effective? Is deployment in the early stages? Are the results showing positive trends? Has the issue been clarified or verified? Is the approach as effective as thought at consensus? Identify the impact the conclusions would have on the Item comment.

Effect of Findings/Conclusions on Score: _____raise _____no effect _____lower
If more than one finding, put "" next to the most important for the score change.)*

The applicant is not re-scored at site visit. Note on this line what the effect would be if the applicant were re-scored. If an effective approach was verified, for which credit was given at consensus, there is "no effect." These effects should be consistent with similar notations on the final Item Worksheets.